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# FI\$Cal *Focus*

FI\$CAL: TRANSPARENCY. ACCURACY. INTEGRITY.

## PREPARING FOR TRAINING DELIVERY

Can you believe we are only three months away from go live? Together, departments and the FI\$Cal Project Team have laid the path for the Pre-Wave Departments to go live on July 1. Many departments, including those with later go-live dates, have stayed engaged in design discussions to get all of us to the day when FI\$Cal is the System of Record for Accounting, Budgeting, Cash Management, and Procurement for the State of California. Thank you!

A special thank you is due to those Pre-Wave Departments who are charting the way by being the first to use FI\$Cal with Requisition, Purchase Order, Receiving, and workflow functions. Our Pre-Wave Departments are:

- ◇ Agriculture Labor Relations Board (ALRB)
- ◇ California Arts Council (CAC)
- ◇ California State Summer School for the Arts (CSSSA)
- ◇ Department of Aging (CDA)
- ◇ California Commission on Aging (CCoA)
- ◇ Department of Fair Employment and Housing (DFEH)
- ◇ Office of Environmental Health Hazard Assessment (OEHHA)

This is a small, but mighty group! Each department keeps working through the activities needed to prepare for their successful implementation of FI\$Cal. Each department, despite the challenges of balancing day-to-day responsibilities with FI\$Cal responsibilities, is preparing to be ready for July 1. As part of FI\$Cal's readiness effort, the Pre-Wave Departments have already participated in Role Mapping and Change Discussion Workshops in March. Up next for the Pre-Wave Departments will be training in May.

Pre-Wave Departments are assigning the System roles that end users will perform to access FI\$Cal and conduct transactions within the System. This was the focus of the Role Mapping Workshop. Next, department managers and supervisors will have discussion with their team members who will have a role in FI\$Cal. We call these "Change Discussions." The purpose of these two activities is to

create awareness and understanding among the Pre-Wave Departments on business processes, system access roles, and related training for the people in the Pre-Wave Departments who will use FI\$Cal starting July 1.

The FI\$Cal Training Team uses the information gathered in the Role Mapping worksheet to identify who needs to be trained. For FI\$Cal, training will be "role based." This means that a person will receive training according to the system access role he or she will have in FI\$Cal. For example, if an end user will be entering requisitions, that person will attend the corresponding course on how to enter requisitions. If someone has multiple system access roles, he or she will be enrolled in multiple courses.

Training for FI\$Cal will include different delivery methods. For general information about FI\$Cal or PeopleSoft, there will be web-based courses that an end user will access from their home department location. For specific training on processes, such as Requisitions and Purchase Orders, FI\$Cal will use instructor-led training. Built into the training materials are practice scenarios. Pre-Wave Department end users will be able to use job aids — materials for quick reference at their desks. In addition to training and job aids, end users will have access to End User Support Labs from May through July to support the go live. These labs are supported by the FI\$Cal Business Team and Change Management Office. The labs permit end users to tackle real-world work issues and ask questions of FI\$Cal trainers.

Again, we want to thank everyone who has supported FI\$Cal. In a few short months, you will see the vision of FI\$Cal become a reality as the Pre-Wave Departments go live!



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# MICHAEL'S PERSPECTIVE

## *A Message From FI\$Cal Project Leadership*

It is truly a once in a career opportunity to be part of a project of this magnitude. To be working with Departmental, Control Agency and Contractor staff that are committed to a single goal of transforming the existing Budgeting, Accounting, Procurement and Cash Management systems of the State of California is a unique and historical event.

Each passing day of the Project continues to be an exciting one. We go live with the Pre-Wave Departments in July of this year. Currently the testing of "Enter and Maintain Vendors," "Create and Approve Requisition," and "Manage Purchase Orders" (includes Receipts) is being performed in a room that has been dedicated to the test

effort. This is being done in preparation of the user acceptance testing that will kick off in early April and continue until early June. The end user training is scheduled to begin mid-May.

*"The end-user training is scheduled to begin mid-May."*

All of this while the Wave 1 efforts move forward too - from Design, to Build, to Test and ultimately Deploy in July of 2014.

It is exciting and I want to thank all the departments and the staff who have participated in the Business Process Re-engineering and Conference Room Pilot sessions.

They too have taken part in this once in a career opportunity and have reasonably assured we will have the best solution for the State of California.

*Michael Garrett is the Assistant Deputy Director of FI\$Cal's Business Team*

## Change is on the Horizon for FI\$Cal Pre-Wave Departments

FI\$Cal recently held the Pre-Wave Change Workshop. This workshop focused on coaching managers and supervisors on how to talk about FI\$Cal with their staff and how to support them through the transition to utilizing the new System. Participants were provided with tools to prepare them for change discussions with their departmental staff. Pre-Wave Departments need to begin having discussions with staff soon. Change discussions are critical to building awareness and preparing end users for FI\$Cal training and go live. End user roles are currently being assigned and end users will begin training in May.

The FI\$Cal Change Discussion Guide include: Accounts Payable (Vendors and the concept of a Vendor Management File), and Purchasing (Requisitions, purchase orders, and receiving).

FI\$Cal also provided a Change Discussion Checklist and Log, as well as an Escalation Plan for questions departments are unable to answer. To use these tools in a real-world setting, departments participated in role playing to practice change discussions in a safe environment.

Departments were provided with the training curriculum for each Pre-Wave FI\$Cal role. Training consists of web-based and instructor-led training focused on their roles. Participants can take web-based training from their own workstations and at their own pace. The instructor led training for Pre-Wave will be held at our FI\$Cal location. It will give participants hands on access to the System. After training, end users will have access to User Support Labs to reinforce their knowledge and skills.

There are many changes on the horizon for Pre-Wave Departments and it is very important that Departments discuss these changes with their staff. The FI\$Cal Change Discussion Guide is an important tool that managers and supervisors will use to prepare themselves and their staff for the transition to FI\$Cal.

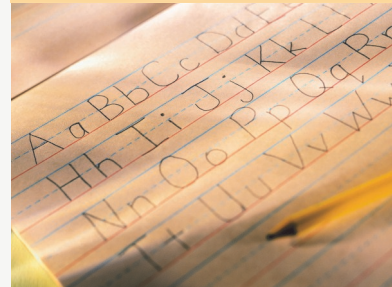
## SAVE THE DATE *FI\$Cal Forum*

**Wednesday • April 24 • 9:30 to 10:30 AM**  
*for State Employees Only*

*For more information, please contact our Change Management Office at [fiscal.cmo@fiscal.ca.gov](mailto:fiscal.cmo@fiscal.ca.gov).*

## GLOSSARY

*This section features acronyms or definitions for the FI\$Cal Project. For a list of additional terms, please visit our website at [www.fiscal.ca.gov](http://www.fiscal.ca.gov).*



**Change Champion:** Identifies activities and messages that help staff achieve change readiness.

**Go Live:** To make FI\$Cal, which had been under development or operating in a limited test mode, fully active so that its intended users can access it.

**Readiness:** The state of being prepared for the implementation of FI\$Cal, both as departments and end users.

**Role Mapping Workshop:** Role mapping is the process of mapping end users to the appropriate FI\$Cal end-user roles required to complete their daily work activities with FI\$Cal. The Workshop is to review the FI\$Cal end-user roles in detail and discuss the activity of role mapping.

**Change Discussion Workshop:** Workshop designed to help department managers and supervisors understand the FI\$Cal changes so they can lead the department end users they supervise through the transition to FI\$Cal.

